SOPHTLOGIC

Rota & Availability
2059 SP13
User Manual

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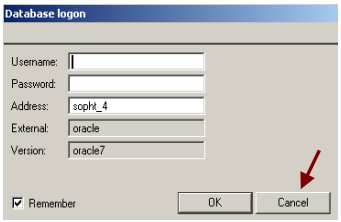
Rotas & Availability

Access / Start Up MIS

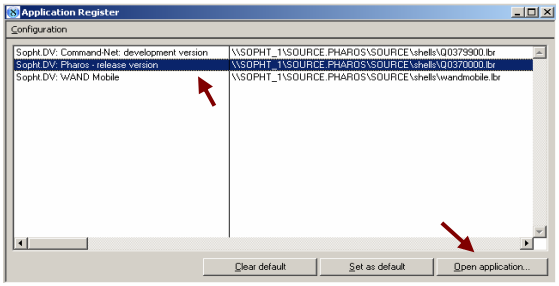
Double click onto the Pharos icon



You may get a Database Logon box appear - if so –

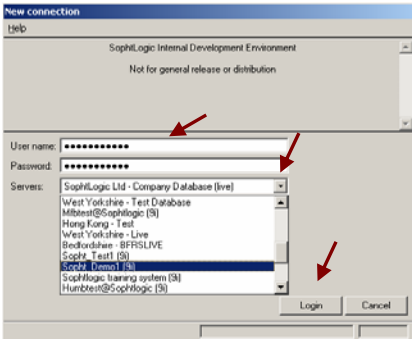
- Click the Cancel button

The Application Register window will open



The Application Register sometimes gives you more than one option to choose from, if this is the case

- Click onto the Pharos option
- Click onto the Open Application button



- Enter your Username
- Enter your Password

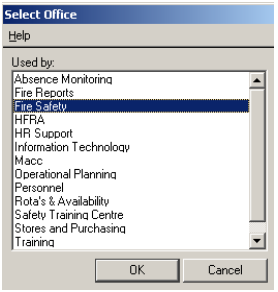
- Click onto the Servers arrow
- Click onto a Station

If you only work at the one Brigade, then this option should be defaulted to your brigade.

- Click onto the Login button

Depending on your Privileges

You may get a Select Office box appear – if so:

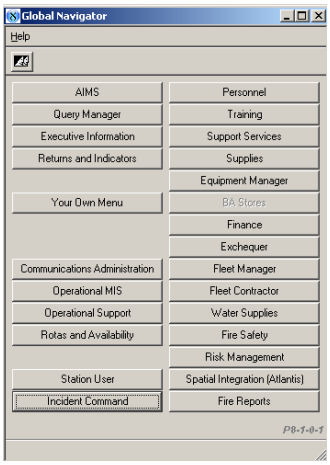


- Select an Office
- Click OK

The Global Navigator window will appear on your screen

Access Rota & Availability Module

Global Navigator



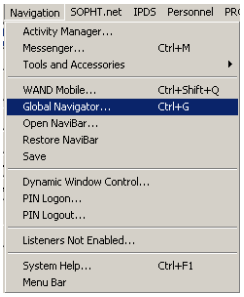
The Global Navigator is the main menu of the system, providing access to each module. A user will only be able to access parts of the system that they have privileges for.

The Global Navigator can be accessed at any time by

- Pressing **Ctrl** & **G** on your keyboard at the same time

or by going to:

- Navigation
- Global Navigator



Enter a Module into the Menu Toolbar

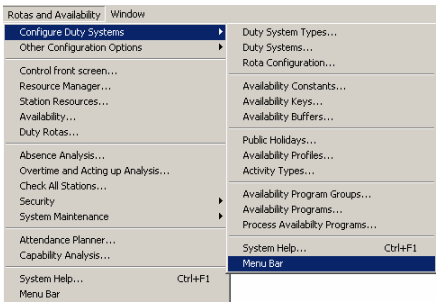
On the Global Navigator menu

- Click onto one of the Rotas and Availability button

The corresponding module will appear in the toolbar: As shown

This gives the user (you) a shortcut access to the sub-menus under that module

Adding Shortcuts to the Menu Toolbar



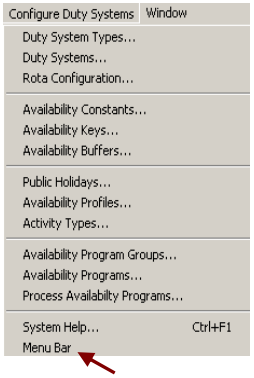
- Click the left mouse button onto 'Rotas and Availability'
- Move your mouse down to 'Configure Duty System'
- Move your mouse to the right
- Move down and left click onto the 'Menu Bar'

You have now added **'Configure Duty System'** to your menu bar.

This now gives you shortcut access to anything within **'Configure Duty System'**

Remove a Module from the Menu Toolbar

- Left click onto the module you want to remove from the menu toolbar
- Move your mouse down the list of options
- Left click onto the Menu Bar



The menu bar is at the bottom of majority of the drop down menus

Follow the same procedure as shown above to close any modules or sub-menus

Introduction

The Rota and Availability system monitors past, present and future availability of Brigade resources e.g. appliances, personnel and equipment. This provides Brigades with an accurate depiction of resource availability and can be used to identify resource shortfalls or surplus'.

The availability system provides an efficient and effective mechanism for performing the complex task of maintaining resource availability.

The **Rota and Availability System** is intrinsically linked to the **Personnel System**. It is necessary to have both systems installed otherwise neither will function.

It is for this reason many e.g. personnel related functions will alter information held and displayed in the Rota and Availability system and vice versa.

How is Availability Obtained/Calculated?

The availability is based upon the following calculation:-

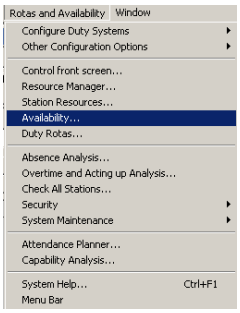
- Today's Date minus the Rota Base Date
- Divided by the number of days in the pattern, will give a number.

This number will locate the position into the pattern

e.g. in a pattern of D D **N** N R R R R 3 would equal the first nightshift.

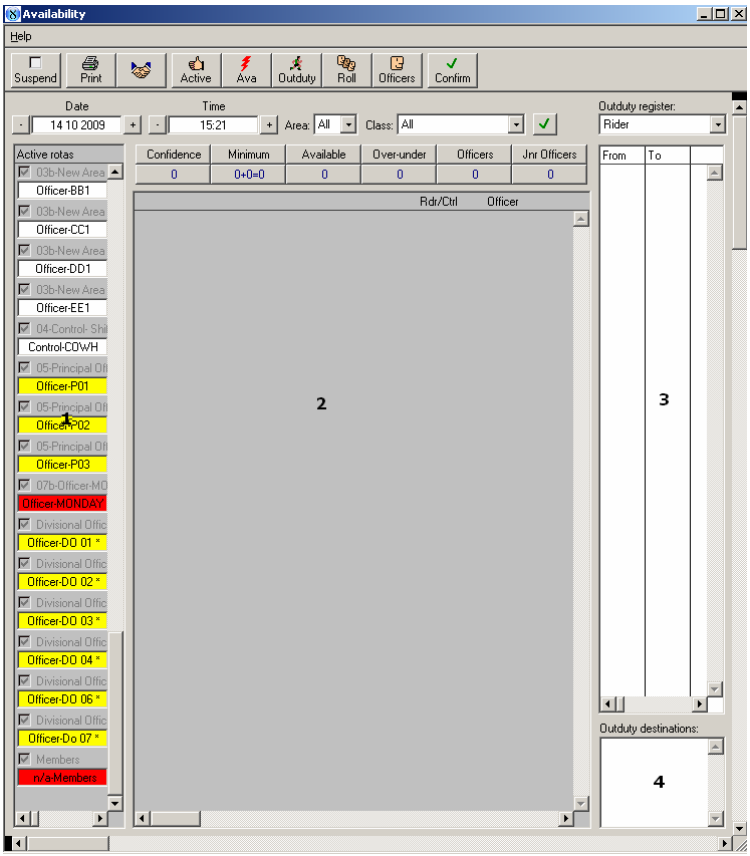
Availability

Availability shows, by Brigade, who and what is the available…



- From the Global Navigator
- Click onto Rotas and Availability
- Scroll down and Click onto Availability

Availability window will appear



As you can see the Availability window has 4 windows

Window 1 – Watches that are available

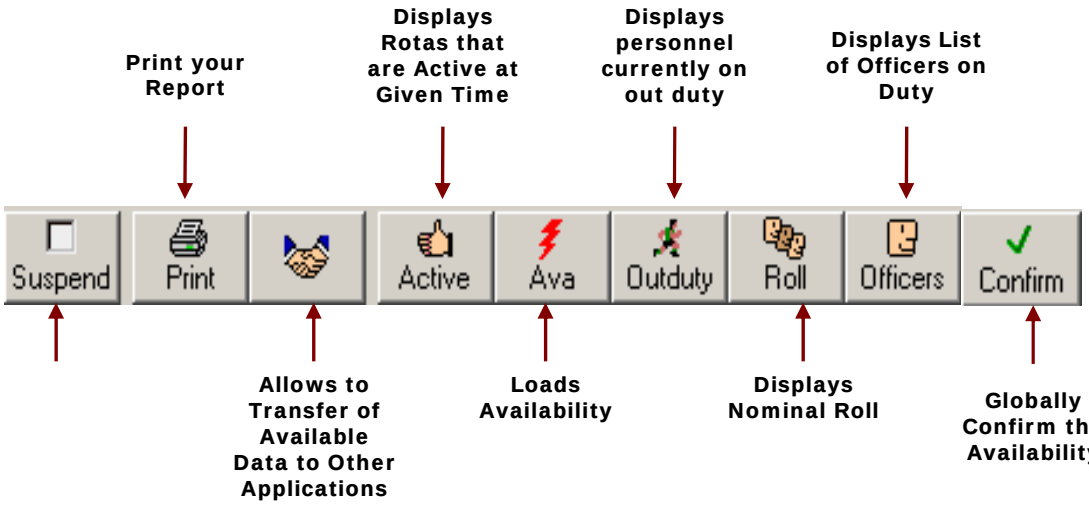
Window 2 – Display Availability by Location (Brigade)

Window 3 - Display personnel on Outduty, or Availability by rank at the given time

Window 4 – Displays Locations that are Available for OutDuty Destinations

Let's start from the top and go through what each window provides

Availability Toolbar

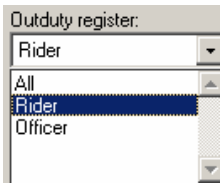


Active Button

- Click onto the Active icon

This Icon will activate the Rotas available at any given time and show in the column on the left of your screen

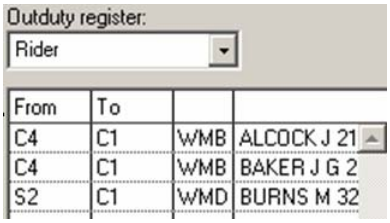
- Choose a Rider / Officer or All on the Outduty Register



Outduty Button

- Click onto the Outduty icon

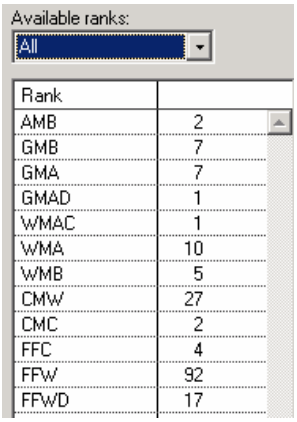
This will show Displays personnel that are actively on 'Out Duty' at given time



It will also show all Outduty Stations within the 'Outduty Destinations' box at the bottom left of your screen. This is usually the same as what is displayed in the main window.

Roll Button

- Click onto the Roll icon

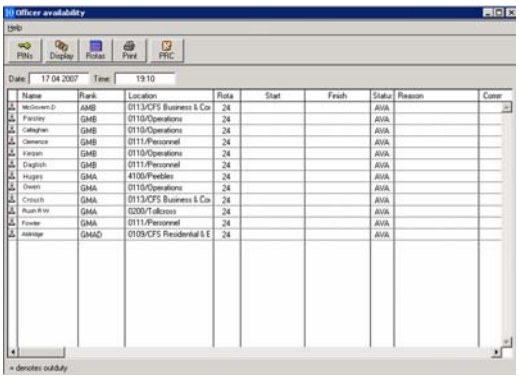


This will show; by rank, who is available for duty at this given time

Officers Button

- Click onto the Officers icon

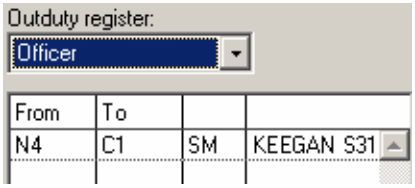
A list of Officers on Duty and Outduties being performed for the date and time as specified on the Availability screen



OutDuty Register

You can also view which Officer is Available or which Officer is on Outduty by

- Clicking on the Outduty Destination
- Select Officers
- Click onto the Outduty icon.

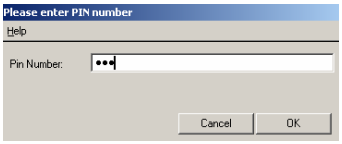


Confirm Button

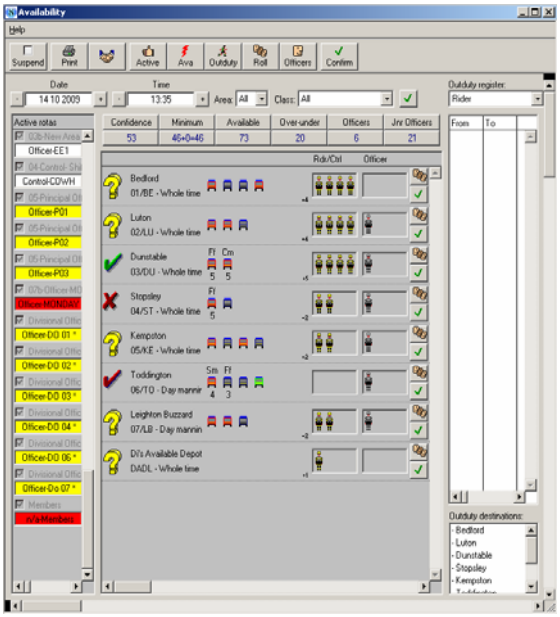
The Confirm button will enable the user to globally confirm the availability.

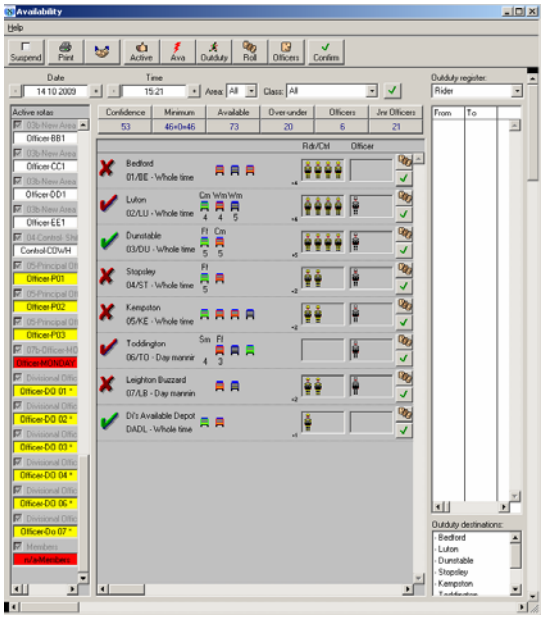
Access to the Confirm button is restricted to those users who have been assigned the system privilege Rotas and Availability - Confirm Availability for All Stations (availability. confirm)

When the user clicks confirm they are requested to enter the personnel pin number.



The system will then confirm the availability for each location and active rota listed in the Availability window. The ridership and minimum ridership is calculated and written to the confirmation table.



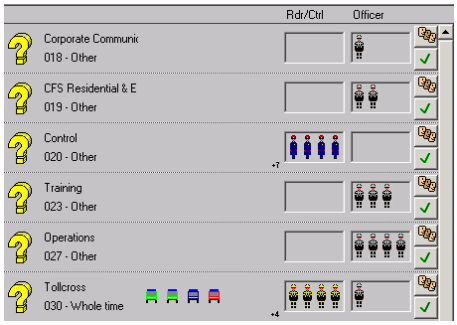


Load the Availability

- Click onto the AVA icon

The system will automatically default to the current date and time when the window was opened.

This will show; what resources are available for duty at this given time.

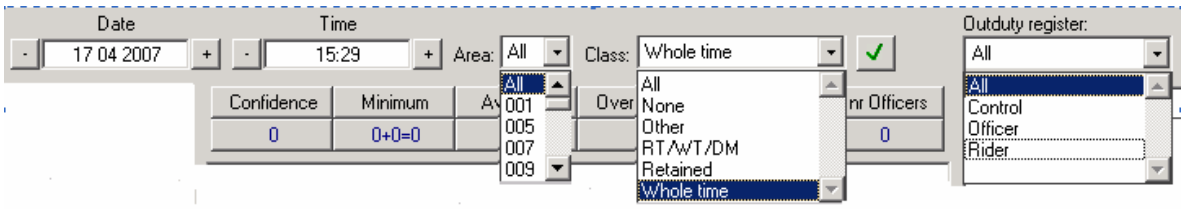


Search Facilities

Let's look at the Search facilities

The date is usually showing 'today's' date and 'time'. Click onto the arrows and choose the

- Area,
- Class
- Outduty Register
- Click onto the Green Tick



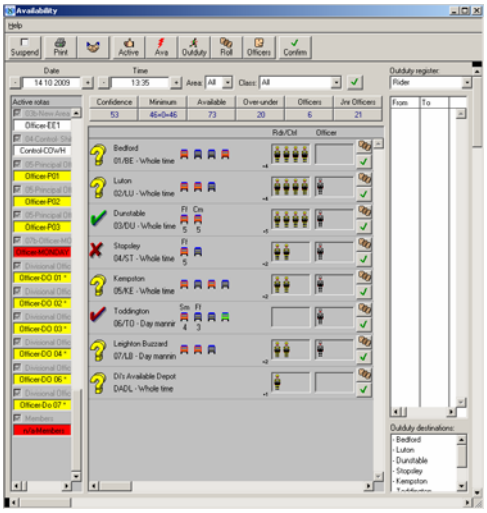
On this day and time I chosen

- Area - All areas
- Class - Whole Time
- Outduty Register - All

The results I got were

Confidence	Minimum	Available	Over-under	Officers	Jnr Officers
76	64+0=64	100	24	3	28

If we look at the bigger picture

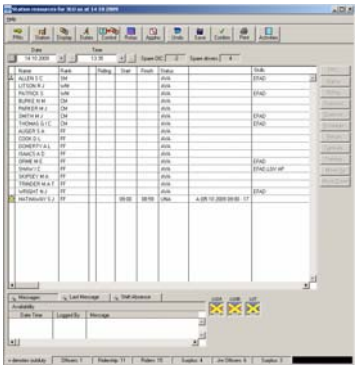


In the centre window it shows, by Brigade, who and what is the available.

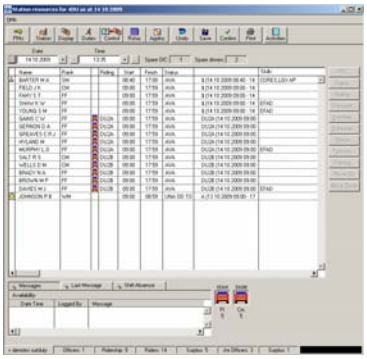
Here we are going to look at the Officer Availability

3 Faces Icon - alongside the station of which watch the user is wishing to view.

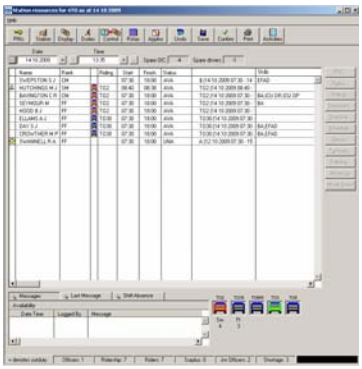
Key:



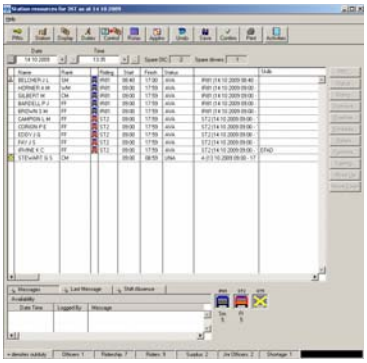
Yellow ? – this indicates that availability for this station, has not been saved



Green Tick – indicates availability has been saved, and confidence levels are met



Red Tick – indicates availability has been saved and station is at minimum ridership



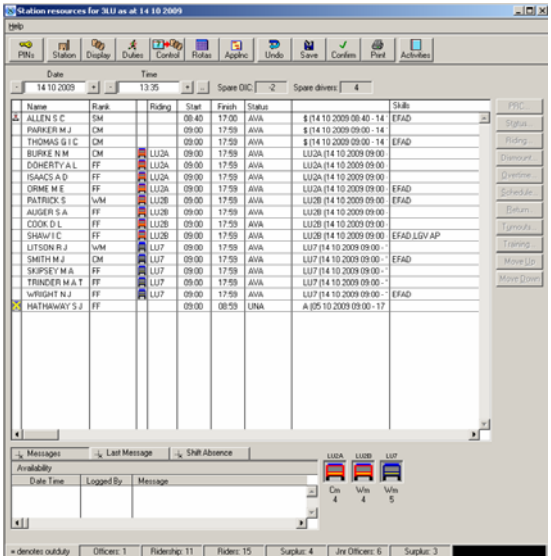
Red Cross – indicates availability has been saved but minimum ridership level has not been met and therefore station is off the run

Checking Station Resources

There are two ways to access the Station Resources

One way is by clicking onto the 3 faces icon which is located at the end of each brigade

The system will open the Station Resources window for the Date and Time as portrayed on the Availability window.



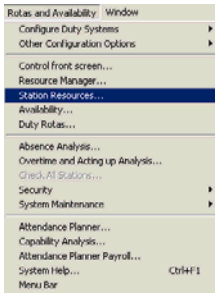
i.e. If the Availability window is opened on the 13/10/2009 at 11:27 and left open for 10 minutes and then the station resources window is accessed via the availability window, the station resources will be displayed for 11:27 and not 11:47.

Next to the '**+**' button by the 'Time' there is a '**..**' button

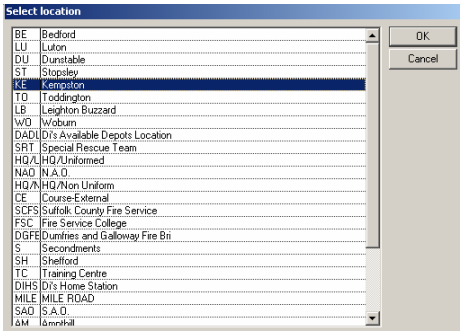
This 'Time Now' button will reset the Date and Time fields to 'Current Date and Time'

The other way is to…

- Click onto Rotas and Availability button
- Click onto Station Resources

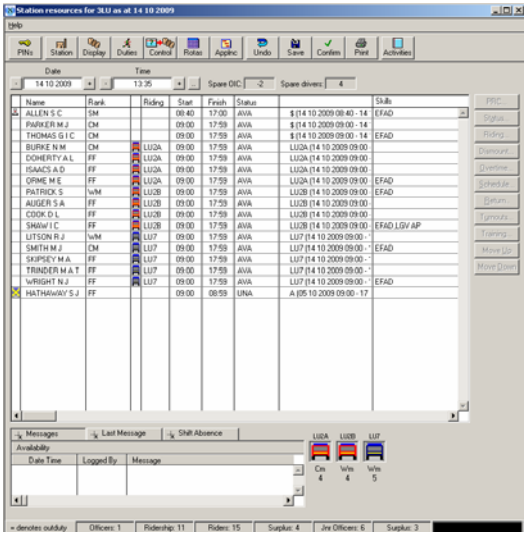


The Select Location Window will appear



- Click onto the Location
- Click onto the OK button

The Station Resources for that Location will appear – as shown



The station resources and capability analysis functions which return the list of skills has been modified to return only those skills which have not expired based upon the frequency on the skill and the date obtained on the skill profile.

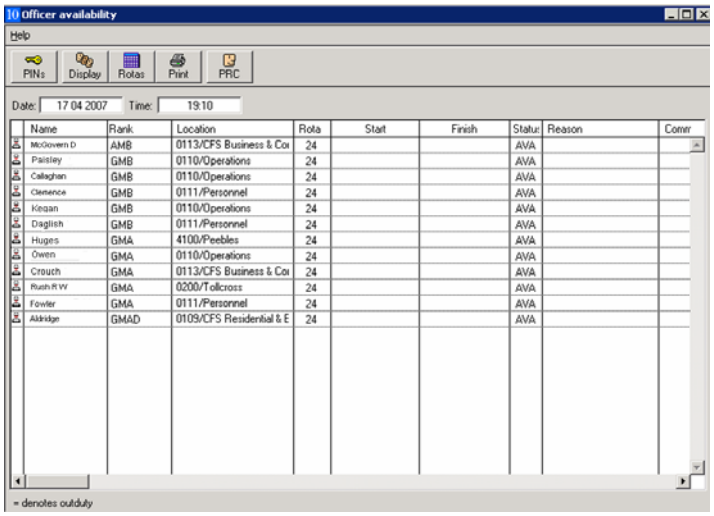
Change of Officer Duty

If you have an Officer that calls in Sick or needs to Change Duty

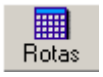
You can Change their duty by using the 'Duty Rota Book' or you can do it from the 'Officer Availability' window

- Click onto the Officers icon

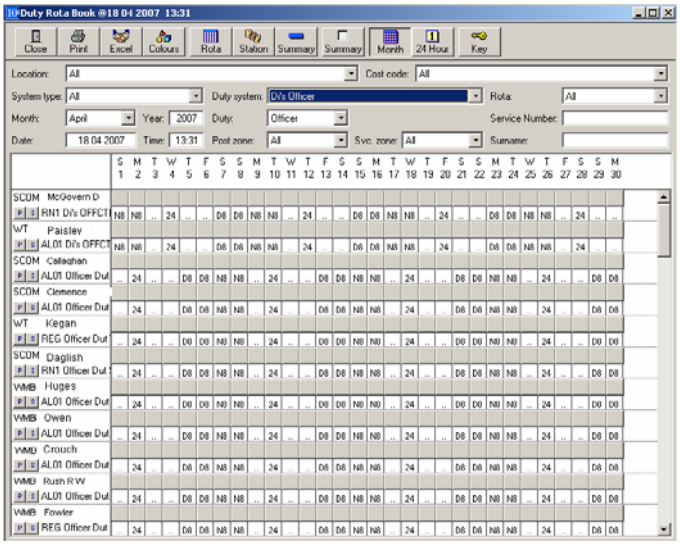
A list of Officers on Duty and Outduties being performed for the date and time as specified on the Availability screen



- Click onto the Rotas icon



The Duty Rota Book window will appear

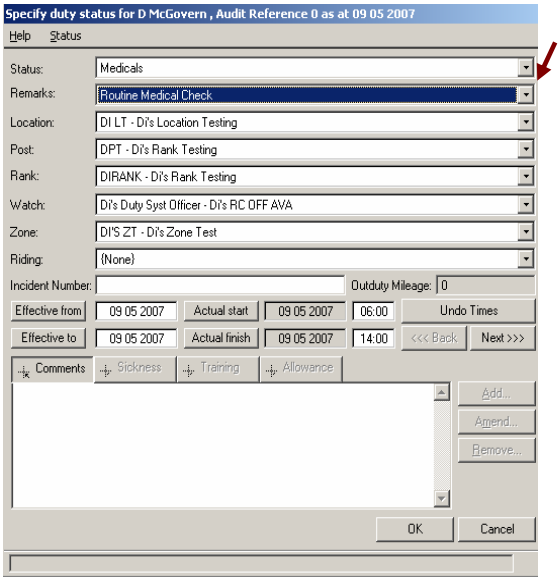


- Create a search
- Click onto the Rota icon

You results will appear in the main window – as shown -

- Click onto one of the gray squares

the 'Specify the Status' window will appear


Specify duty status for D McGovern , Audit Reference 0 as at 09 05 2007
Help
Status
Status: Medicals
Remarks: Routine Medical Check
Location: DI LT - Di's Location Testing
Post: DPT - Di's Rank Testing
Rank: DIRANK - Di's Rank Testing
Watch: Di's Duty Syst Officer - Di's RC OFF AVA
Zone: DI'S ZT - Di's Zone Test
Riding: (None)
Incident Number:
Outduty Mileage: 0
Effective from 09 05 2007 Actual start 09 05 2007 06:00 Undo Times
Effective to 09 05 2007 Actual finish 09 05 2007 14:00 <<< Back Next >>>
Comments
Sickness
Training
Allowance
Add...
Amend...
Remove...
OK
Cancel

Here you will be able to change the Duty Status of the Officer

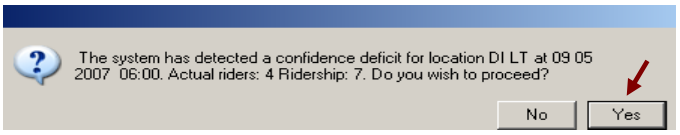
For example:-

Sickness, Outduty, Leave, Training, Medical etc.

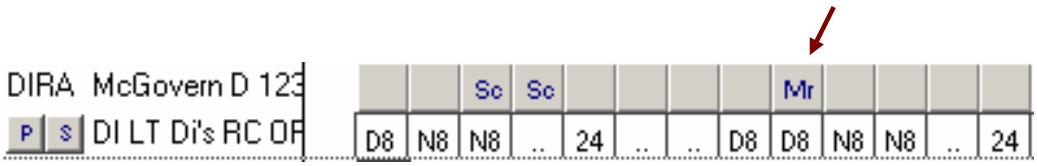
- **Click onto the Arrow**
- **Choose an option**
- **Click OK**

You may get a conflict message appear

- Click onto the Yes button

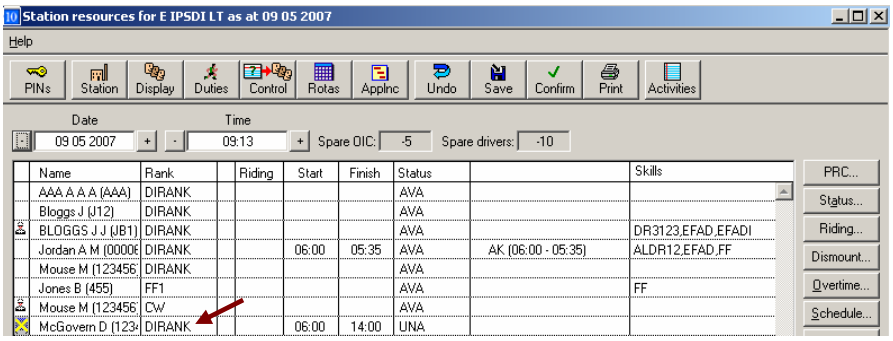

The system has detected a confidence deficit for location DI LT at 09 05 2007 06:00. Actual riders: 4 Ridership: 7. Do you wish to proceed?
No
Yes

As you can see the sickness has now been entered into the Duty Rota Book



Open the Availability window

- Click onto the 3 faces


Station resources for E IPSDI LT as at 09 05 2007
Help
PINs Station Display Duties Control Rotas AppInc Undo Save Confirm Print Activities
Date 09 05 2007
Time 09:13
Spare OIC: -5
Spare drivers: -10
Name Rank Riding Start Finish Status Skills
AAA A A A (AAA) DIRANK AVA
Bloggs J (J12) DIRANK AVA
BLOGGS J J (JB1) DIRANK AVA DR3123,EFAD,EFADI
Jordan A M (0000 DIRANK 06:00 05:35 AVA AK (06:00 - 05:35) ALDR12,EFAD,FF
Mouse M (123456 DIRANK AVA
Jones B (455) FF1 AVA FF
Mouse M (123456 CW AVA
McGovern D (123 DIRANK 06:00 14:00 UNA
PRC...
Status...
Riding...
Dismount...
Overtime...
Schedule...

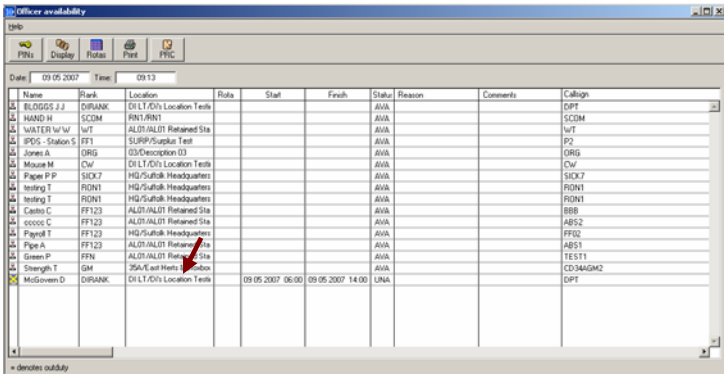
Within Station Resources it is now showing that Officer unavailable

- Click onto the 'X' in the corner

Within the Availability Window

- Click onto the Officers Icon

Again the system shows that the officer is unavailable



Duty Rota Book

Pre-planning Attendances

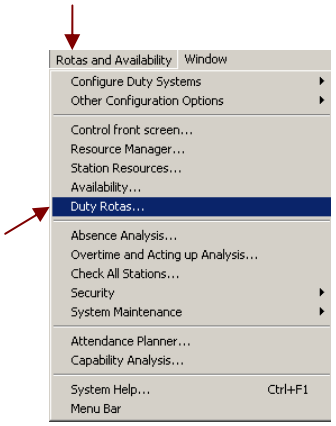
- Provides the facility to determine past, present and future staffing throughout the Brigade
- Provide summarised information on demand about station levels of sickness, leave, training course attendance.

Features

- Duty summary for a selected station by calendar month
- Display or print the Duty Rota for a selected month by 'Station', 'Zone', 'Division' etc
- A direct link to station resources i.e. Riders board for the current date and time.

To enable the 'Duty Rota' to function correctly a prerequisite exists whereby the following setup procedures must have been completed. Duty System, Duty System Types, Rota Configuration (please see previous section)

- On the Global Navigator
- Click onto Rotas and Availability

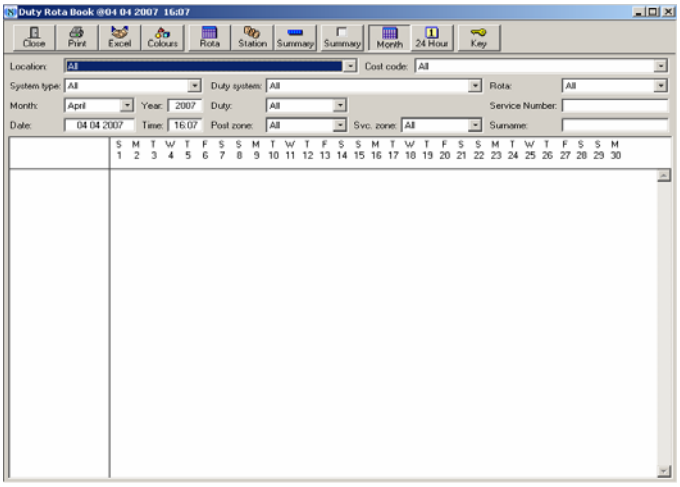


This will now appear in the Menu Toolbar

Move you mouse down until you highlighted

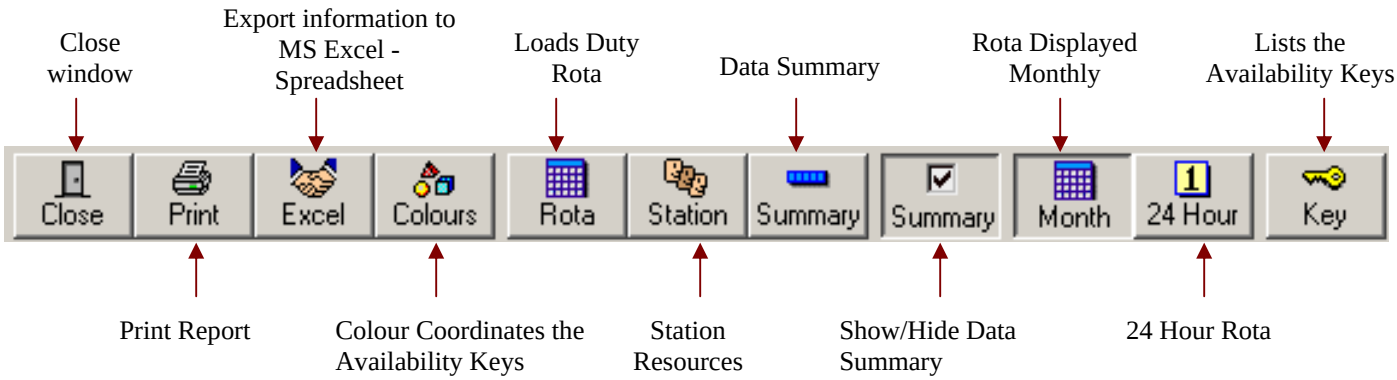
- Duty Rotas

The Duty rota Book Window will appear



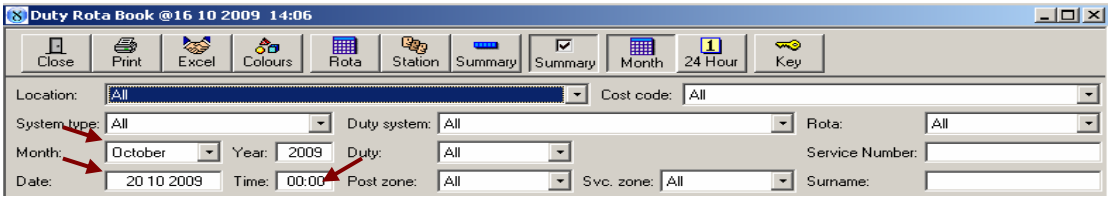
The system will default to the current date and time.

Duty Rotas Toolbar



How to Perform Searches

The 'Duty Rota' enables searches on single or multiple criteria, as illustrated below



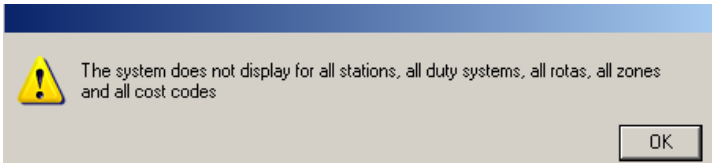
The system will by default display the current month, year, date and time in the respective fields

Go to the search section of the 'Duty Rota'.

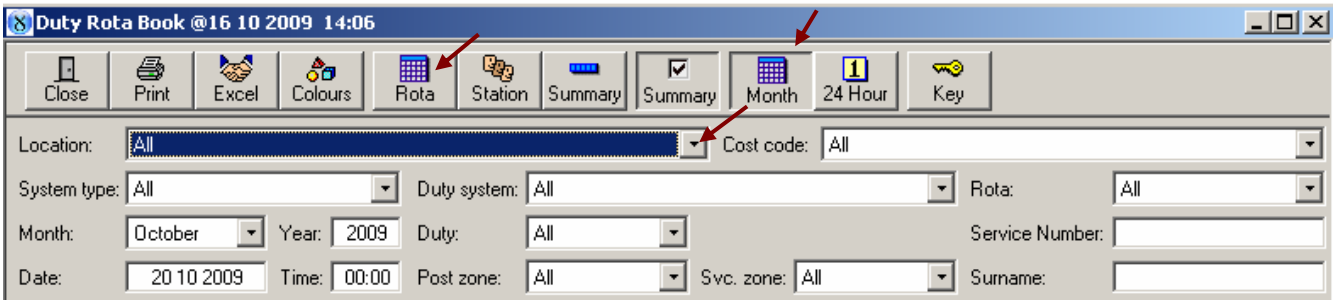
The mechanism is provided to search by 'Location', 'Cost Code', 'System Type', 'Duty System', 'Rota', 'Post Zone', 'SVC Zone', 'Service Number', 'Surname' and by 'Month', 'Year', 'Date' and 'Time'

Please note a search must be performed. If a user inadvertently attempts to display the duty rota prior to setting search criteria the following help message will generate

- Click the 'OK' button

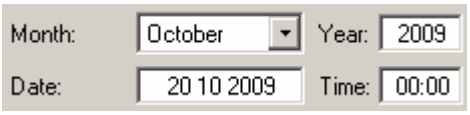


If search criteria is to be selected from drop down list fields e.g. 'Location'.

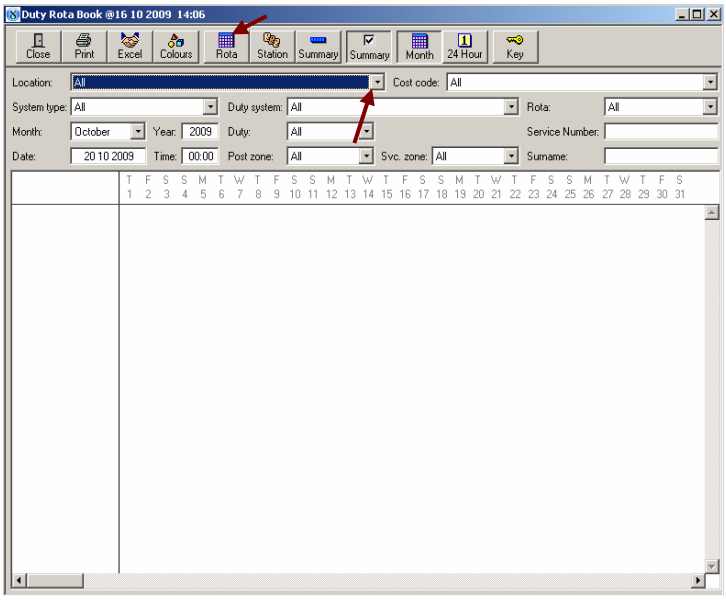


- Click onto the 'Location' arrow
- Choose one of the 'Locations'
- Repeat this procedure for, 'System Types', 'Duty System', 'Rota' or 'Post Zone' and 'Svc. Zone'

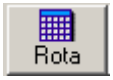
To determine Past, Present and Future staffing throughout the Brigade alterations must be made to the default date related fields. If these fields are not altered the system will only return Duty Rota Analysis for the current month.



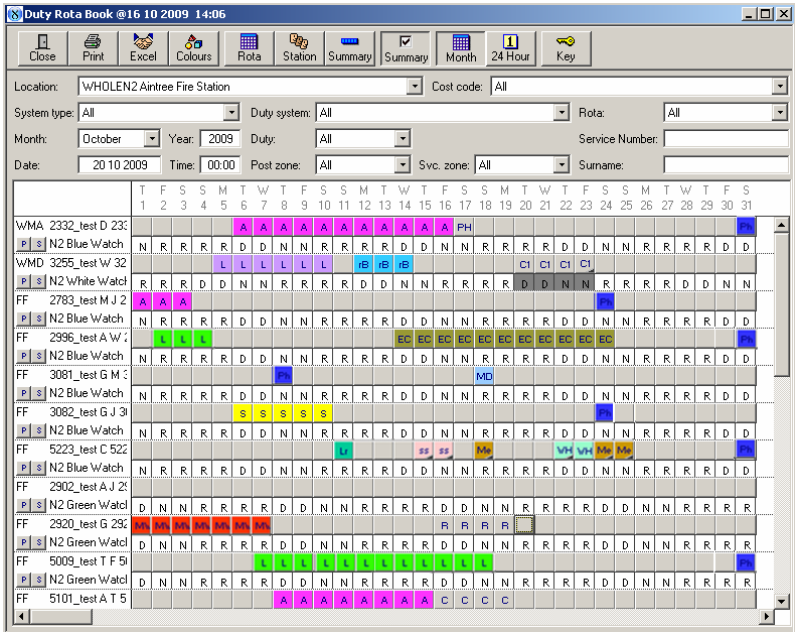
The 'Duty Rota' provides the mechanism to display rotas by multiple criteria enabling an efficient and effective means by which to view and analyse past, present and future staffing within the selected Brigade.



- Click onto the arrow for Location
- Select a Location
- Click onto the Rota icon



In the Duty Rota Book



As you can see you have a quick reference of everyone's Sickness, Leave, Meetings, Reminders, Public Holiday etc…

This is an excellent way in keeping track of all personnel's where about.

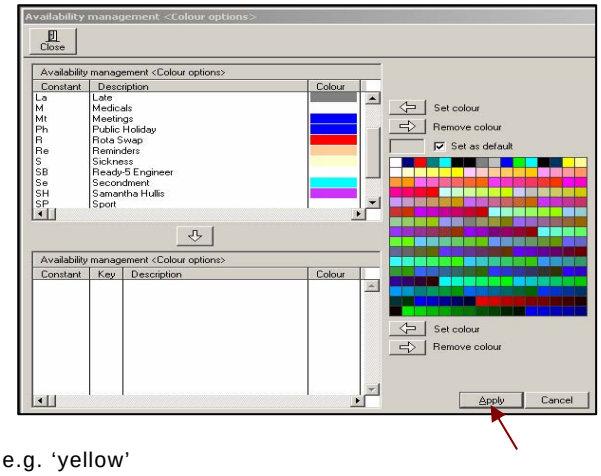
A month's availability will display for all personnel who associate to the criteria entered.

You can colour coordinate each Availability Key to make it easier to see who's doing what…

Setting Availability Keys Colours

In the toolbar

- Click onto the **Colours** icon



Here you can colour coordinate the descriptions

- Click onto the required 'Availability constant' e.g. 'Leave'

Please refer to the 'paint pallet', select the required colour e.g. 'Yellow'

The 'Set as default' colour field will now display the selected colour e.g. 'yellow'

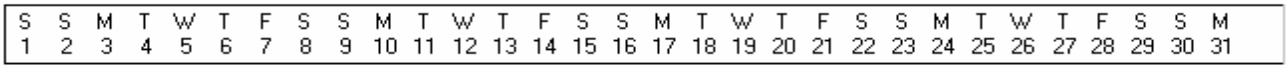
- Select the 'Set colour' button
- Once completed, click Apply

Continue until all Availability Keys have been assigned to a colour

Specify Duty Status

Entering Brigade Availability

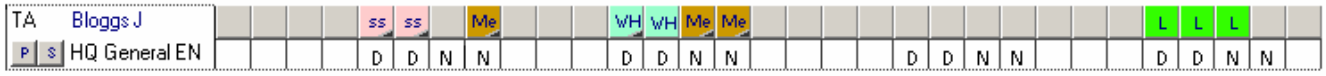
The top of the Duty Rota display identifies each day in the month by the date and first letter of the day e.g. M10 equating to Monday 10th of the selected month.



Entering Resource Availability

The Duty System Pattern is displayed in the enclosed white boxes, as previously defined via the 'Duty Systems' option of the 'Setup' menu.

When availability has been entered, it is displayed in the enclosed grey/coloured boxes – as shown.

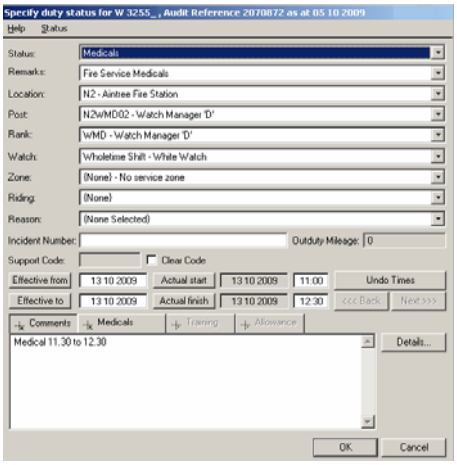


By clicking on any of the coloured / gray squares the 'Specify Duty Status' window will appear and give you detailed information – as shown below.

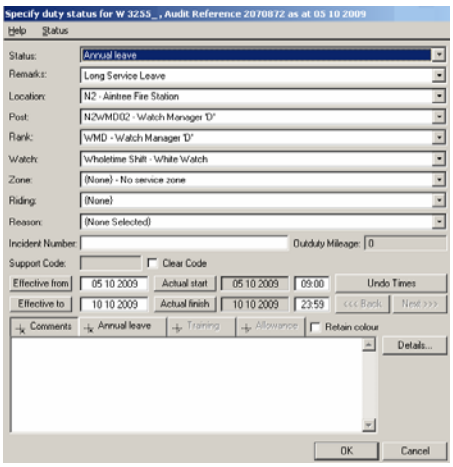
- Click onto one of the boxes, within the table

A Specify Duty Status window will appear with the information for the absences – here are two examples

Within this example: One is for Medical Appointment, the other is for Leave.


Specify duty status for W 3255_, Audit Reference 2070872 as at 05 10 2009
Help Status
Status: Medicals
Remarks: Fire Service Medicals
Location: N2 - Aintree Fire Station
Post: N2WMD02 - Watch Manager 'D'
Rank: WMD - Watch Manager 'D'
Watch: Wholetime Shift - White Watch
Zone: (None) - No service zone
Riding: (None)
Reason: (None Selected)
Incident Number: Outduty Mileage: 0
Support Code: Clear Code
Effective from 13 10 2009 Actual start 13 10 2009 11:00 Undo Times
Effective to 13 10 2009 Actual finish 13 10 2009 12:30 <<< Back Next >>>
Comments Medicals Training Allowance
Medical 11.30 to 12:30
Details...
OK Cancel

If 'Annual Leave' is being entered for a period of e.g. two weeks, amend the 'Effective to' date to reflect this by clicking on the 'Actual Finish' button and selecting the end date in the calendar displayed.

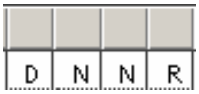

Specify duty status for W 3255_, Audit Reference 2070872 as at 05 10 2009
Help Status
Status: Annual leave
Remarks: Long Service Leave
Location: N2 - Aintree Fire Station
Post: N2WMD02 - Watch Manager 'D'
Rank: WMD - Watch Manager 'D'
Watch: Wholetime Shift - White Watch
Zone: (None) - No service zone
Riding: (None)
Reason: (None Selected)
Incident Number: Outduty Mileage: 0
Support Code: Clear Code
Effective from 05 10 2009 Actual start 05 10 2009 09:00 Undo Times
Effective to 10 10 2009 Actual finish 10 10 2009 23:59 <<< Back Next >>>
Comments Annual leave Training Allowance Retain colour
Details...
OK Cancel

If, for example, a medical was being entered then the user would need to amend the 'Start' and 'Finish' times as well thus enabling an accurate record of duty status in 'Real' terms e.g. 4.5 hrs opposed to an entire shift of 8 hours.

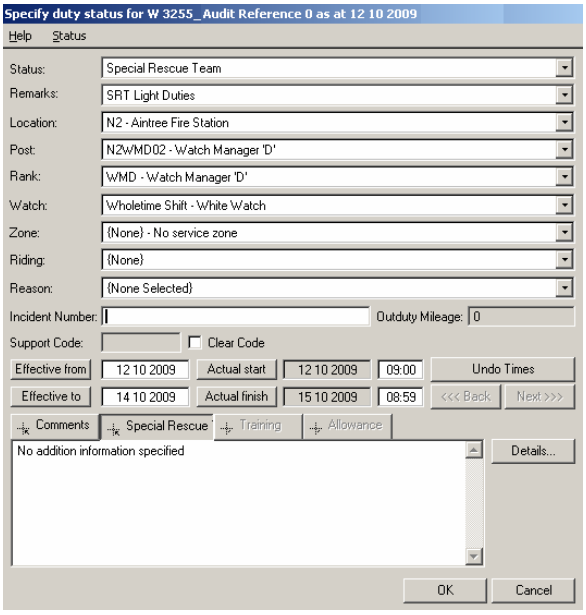
Entering a Specific Duty

In this example, I am entering a 'Specific Duty Status' for 'Special Rescue Team'.

- Click onto one of the gray squares



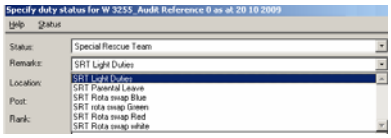
The Specify Duty Status window will appear



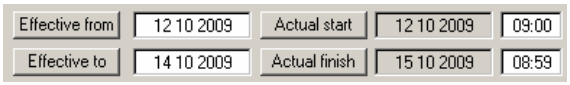
The system defaults to 'None Selected'

- Click onto the 'Status' arrow to enable the viewing of all 'Availability Constants' groups.

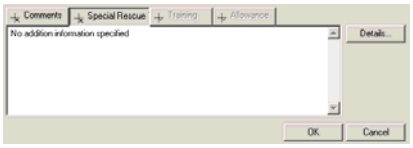
- Select one of the options from the list
- Click onto the 'Remarks' arrow to enable the viewing of all 'Availability Keys'.



- Select one of the options from the list

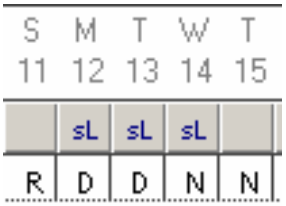


- Change 'Effected To' date and times



- Enter any additional information in the 'Comments' tab
- Click onto the OK button

As you can see in the 'Duty Rota Book' the Availability Keys have been entered

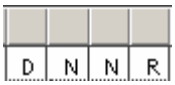


The Keys will differ from Brigade to Brigade, depending on their setup.

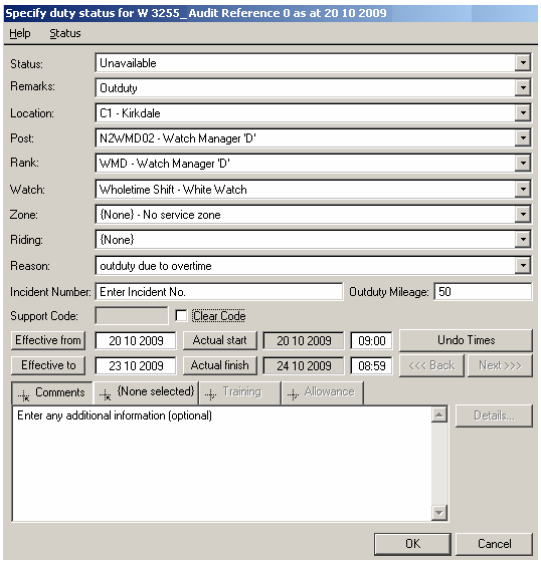
Entering OutDuty

The ‘Station Resources’ has been modified so that when an ‘Outduty’ is inserted spanning several duty periods the system will create a transaction for each duty day within the transaction date range. This is consistent with the ‘Duty Rota Book’.

- Click onto one of the gray squares

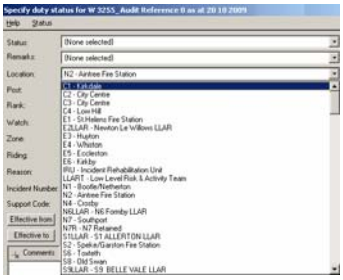


The Specify Duty Status window will appear



The system defaults to ‘None Selected’

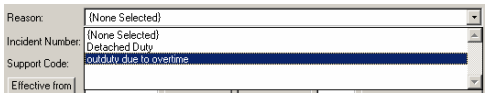
- Click onto the ‘Location’ arrow to enable the viewing of all ‘Home Stations’.



- Select one of the options from the list

Here you will be able to enter a ‘Reason’ why the person has been sent on ‘Outduty’

- Click onto the ‘Reason’ arrow

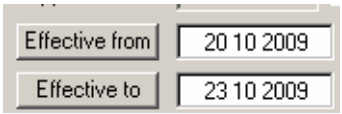


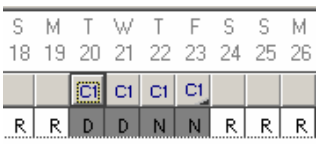
If there is an Incident Number > Enter the ‘Incident Number, into the box

If there are OutDuty Mileage > Enter the ‘Mileage’ into the box

If the ‘OutDuty is for more than one day

- Change ‘Effected To’ date to the last day of the Outduty
- Enter any additional information in the ‘Comments’ tab
- Click onto the OK button





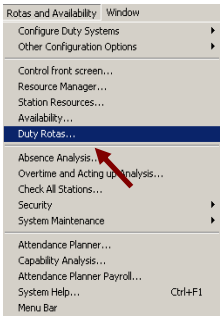
As you can see in the ‘Duty Rota Book’ the Availability Keys have been entered.

Entering Sickness

Within the Duty Rota Book, some Stations will enter 'Provisional Sickness' on a Daily basis others will go into the First day and just change the 'Effective To' Date until the person returns to Duty (Recommended). Either way is fine and will work in the same way, the only difference between the two is in Absence Manager. One way – '**Daily Entry'** - will have many entries attached to the Sickness. The other – '**Bulk Entry'** - will only show one or two entries attached to the Sickness.

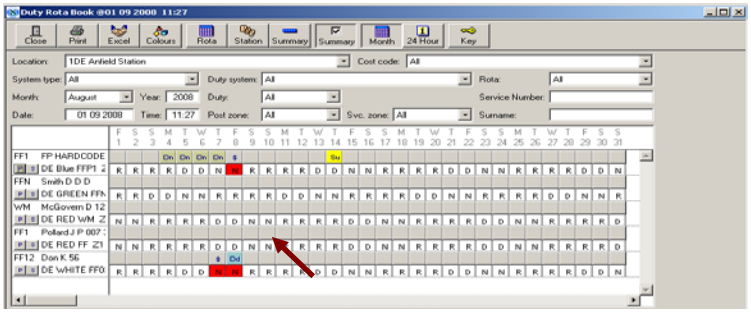
To open the Duty Rota Book

Within Global Navigator



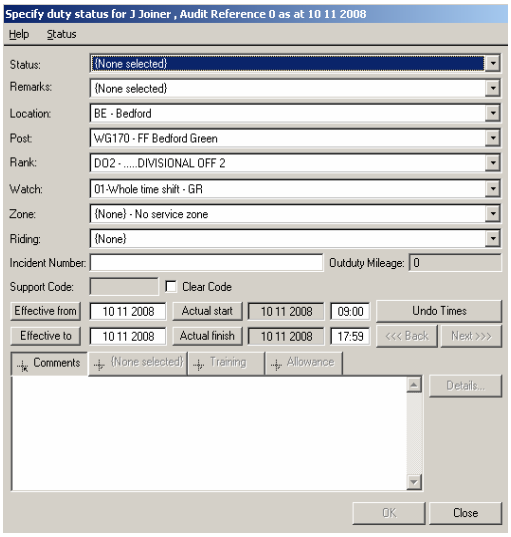
- Click onto Rotas and Availability
- Scroll down to Rotas

The Duty Rota Book will appear



- Click onto the 1st day of the Sickness

The Specify Duty Status window will appear



When entering Sickness, the window will amend automatically once the 'Sickness Status' has been selected.

This then enables you to specify a Sickness Period, within 'Remarks', to which the Sickness is to be attached.

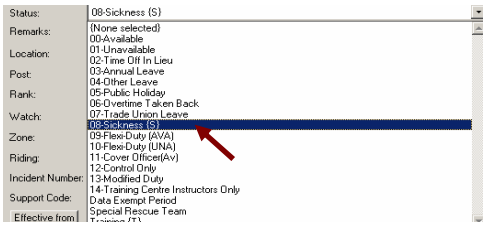
This depends on your Sickness Settings. e.g. some Brigades will enter 'Un-Certificated' – for the First Seven days and 'Certificated' there after, others will use a different approach to entering their Sickness e.g. Sickness Due to Service / non Service. Either way the process is the same.

Let's add a Sickness Period to the Rota Book

Status

The ‘Status’ option is the Grouping of the details; i.e. Sickness, Leave, Training etc…

- Click onto the Status Arrow
- Click onto the Sickness Option



To setup the ‘Status’ - Go to ‘Rotas & Availability’ - ‘Configure Duty Systems’ - Click onto ‘Availability Constants’ – ‘Add’ button.

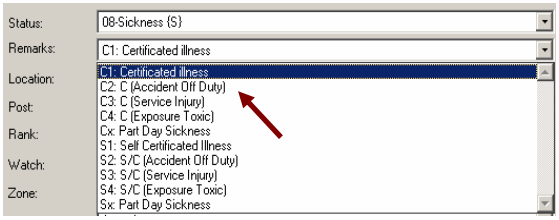
Remarks

The ‘Remarks’ are the ‘Causes’ that are under the chosen ‘Status’ option.

When the Status ‘Sickness’ is selected the ‘Remarks’ box automatically default to ‘Certificated Illness’.

To change the ‘Remarks’ option…

- Click onto the ‘Remarks’ arrow



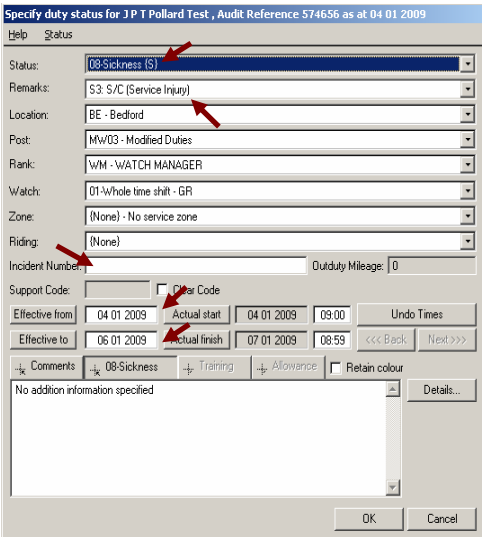
A selection of ‘Types of Sickness’ options will be available; depending on your set up, for you to choose from.

To set up ‘Remarks’ go to ‘Rota & Availability’ – ‘Configure Duty Systems’ - Click onto ‘Availability Constants’ - ‘Sickness’ - ‘Sub Availability Constants’ – Show – Add.

The ‘Sickness Status’ and ‘Remarks’ options have been entered into the Specify Duty Status window.

The persons Location, Post, Rank, Watch and Zone will automatically be entered into the Specify Duty Status window.

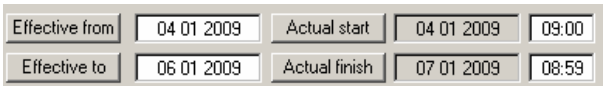
The Incident Number - if the Sickness is related to an Incident then you must enter the Incident Number here.



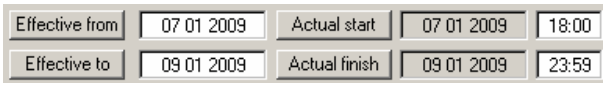
Effective To’ and ‘From’ Dates

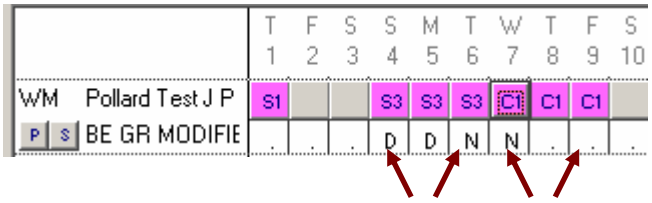
The ‘**Effective To**’ and ‘**From**’ Date show’s the Date of the grey box you clicked onto in the ‘Duty Rota Book’. If the person has more then one day off Sick then change the ‘**Effective To**’ Date to the last day the person was off Sick – This is usual done on a daily basis, until the person returns to duty.

First 3 days - Day shift start time Night shift finish time



Last 3 days – Night shift start time Midnight finish time





Notice the times are different this is because the last 3 days change from a night shift duty to a day off – as shown

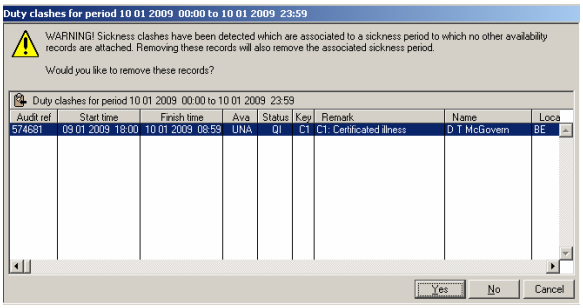
The midnight Finish time (11.59) shows the person is not on Duty otherwise it would be 17.59 (day) 8.59 (night).

Another Example is when you are entering Sickness on a daily basic through the Duty Rota Book instead of changing the ‘Effective To’ date in the Specify Duty Status window.

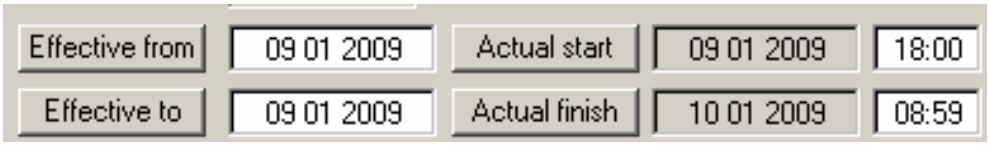
Duty Clashes

When entering a Sickness Daily over Duty Days you will need to change the TIMES in the 'Specify Duty Status' window. If you do NOT do this the TIMES this will 'Clash' and a dialog box will appear - as shown below.

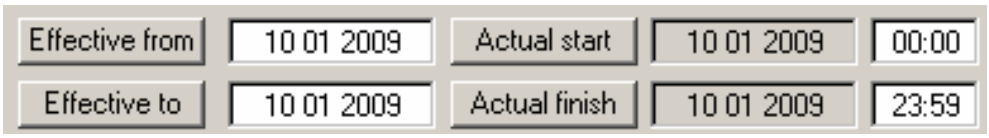
The reason the times are crashing could be that the person would have been on a Night Duty and the times for the Day Off would have been 00:00 to 23.59



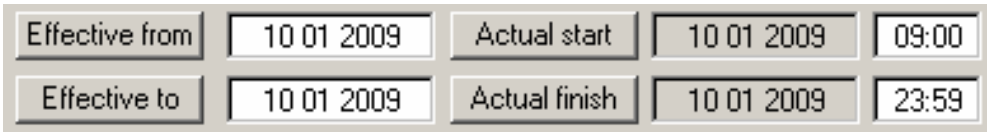
The Night Duty shift does not end until 08.59 in the morning of the 10/01/09



On the next day entry – Day Off – the time is 00:00 – 23:59 this will Clash with the Duty System as the Finish time on the 09/01/09 finishes at 8.59am on the 10/01/09 but the Start time on the 10/01/09 started at 00:00am before the finish time!!!



By changing the Actual Start time from 00:00 to 09:00 this will not Clash with the Duty



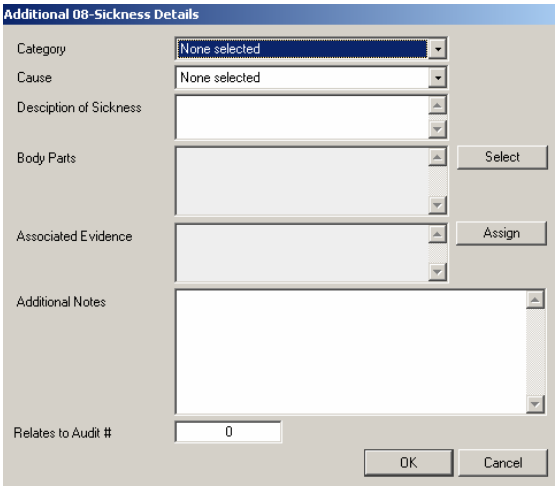
Under the Sickness Tab it will show 'No Additional Information Specified' this will be updated when you enter the Sickness Details. - Shown on next page –

When the person calls up and say they are too Sick to come to work they would usually say why i.e. Cold, Injury, Headache etc… you can enter this information given into the Duty Rota Book Details.

Within the 'Specify Duty Status' window…

- Click onto the Details button

The 'Additional Sickness Details' window will appear



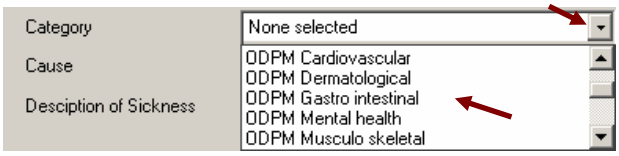
Here you would enter the reason for the Sickness and enter any updates; if any.

Let's go over each Sickness Details

Sickness Category

Sickness Category – this is the main group of Sickness

- Click onto the 'Category' arrow
- Select the reason why this person is off Sick

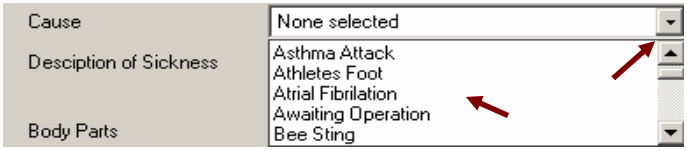


To setup the 'Category' - Go to 'Rotas & Availability' - 'Configure Duty Systems' - 'Availability Setup' - Click onto the 'Availability Category' folder.

Sickness Cause

Sickness Cause – this is the a breakdown of the Sickness

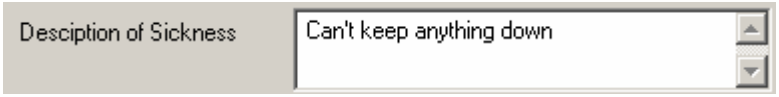
- Click onto the 'Cause' arrow
- Select one of the options



To setup the 'Cause' - Go to 'Rotas & Availability' - 'Configure Duty Systems' - 'Availability Setup' - Click onto the 'Availability Reason' folder.

Description of Sickness

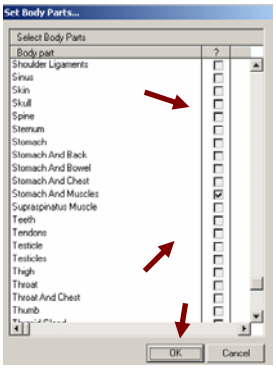
Description of Sickness – this is where you can detail what is wrong with the person –



- Click into the box and type a Description of the Sickness

When viewing Sickness entries via the Duty Rota Book or Station Resources window, the Description of Sickness entered will be <u>VISIBLE.</u>

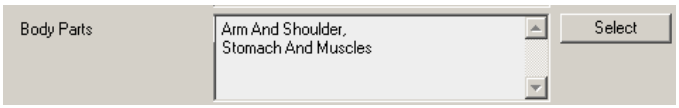
Body Parts



Body Parts – breaks down even more what parts of the body is hurting/broken/upset etc

- Click onto the 'Select' button

- Click into the boxes that relate to the Sickness
- Click onto the OK button



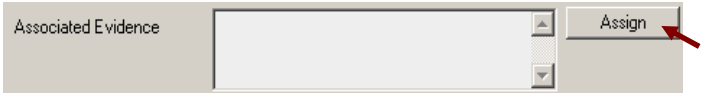
The Body Parts selected will appear in the Body Parts window

To setup the 'Body Parts' - Go to 'Rotas & Availability' - 'Configure Duty Systems' - 'Availability Setup' - Click onto the 'Availability Object' folder.

Associated Evidence

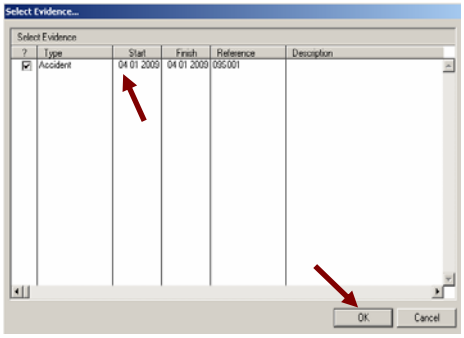
Associated Evidence - allows you to assign any evidence that is related to the Sickness

- Click onto the Assign button



- Select the Evidence box that is related to the Sickness
- Click onto the OK button

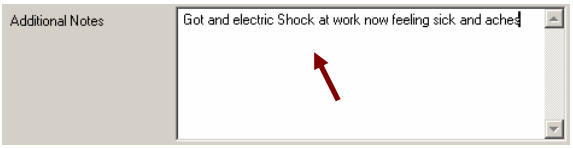
To enter Associated Evidence – go to Personnel – Scroll down to Health & Safety – Click onto Accident Book – Click onto Insert – enter Accident that is related to the Sickness - OK.



The Accident number will appear in the Associated Evidence window.

Additional Notes

Additional Notes - allows you to enter any other 'Notes' about the Person and/or Sickness.



When viewing Sickness entries via the Duty Rota Book or Station Resources window, the Additional Notes entered will be <u>VISIBLE.</u>

Relates to Audit

The number that appears in the box relates to the Audit Reference Number that relates and appears at the top of the Specify Duty Status window on the 1st day the sickness was entered – shown below.

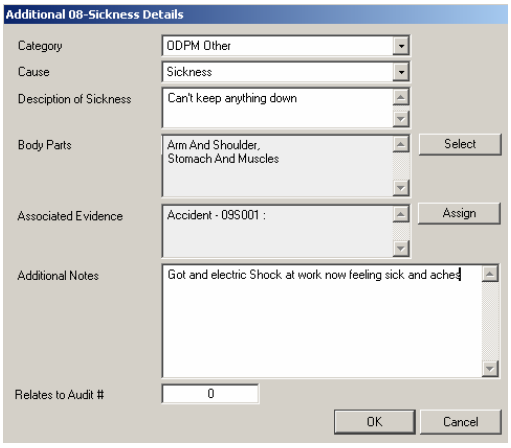
The First bulk / day of Sickness that is entered is called the 'Parent' any additional Sickness days that is entered are called the 'Child'. The 'Parent' is the 'Sickness Audit Number' the Child will relate to. – unless it is a new sickness -

If the sickness needs to be related to a previously entered sickness and/or the Audit Number does not appear in the Audit box, enter a '**-1**' in the Audit box – this will let the system know that the two sicknesses are related.

In the reverse, if you have entered a block Sickness but it's two separate Sicknesses, in the 'Relate to Audit' box, delete the number and enter a '**0**' this tells the system that this entry is a New Sickness

Once you have completed filling out the 'Additional Sickness Details' form

- Click onto the OK button



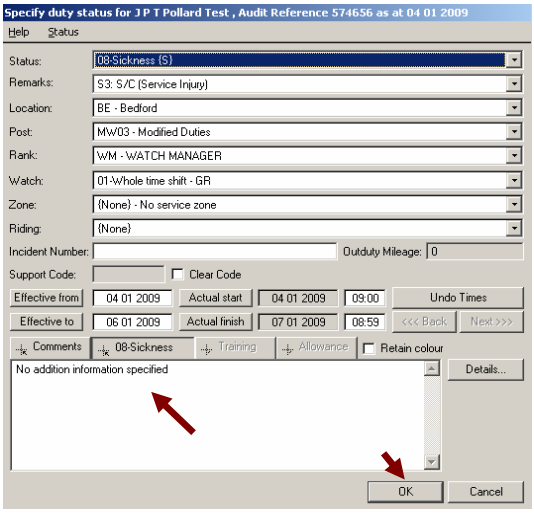
As you can see all the boxes are filled in giving as much information about why the person is off and about the Sickness.

The more information you collect and enter the better understanding why the person is unable to work.

At the moment the 'Related Audit Number' is showing a '**0**' this is because it is the 'Parent' when you add additional Sickness days 'Child' the audit number that is showing at the top of the 'Specify Duty Days' window will be the same as the one in the 'Child' 'Additional Sickness Details' window.

- Click onto the OK button

The information has not appeared under the Sickness Tab



This is because you have not refreshed the window

- Click onto the OK button

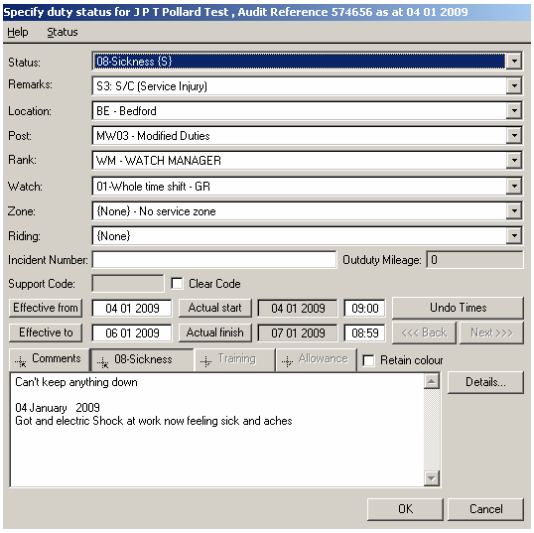
As you can see the Sickness has now been entered into the Duty Rota Book

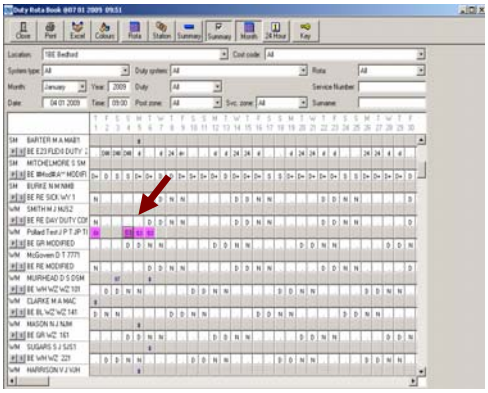
I had entered a block Sickness of 3 days

- Click onto the Day in question

The information you added in the Description and Additional Notes have appeared under the Sickness Tab.

- Click onto the OK button

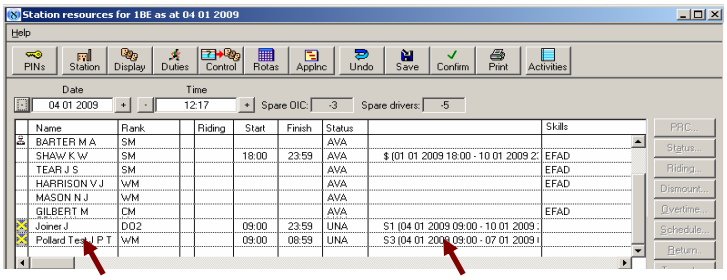




You will now be returned to the Duty Rota Book

As you can see the sickness has been entered in the Duty Rota Book

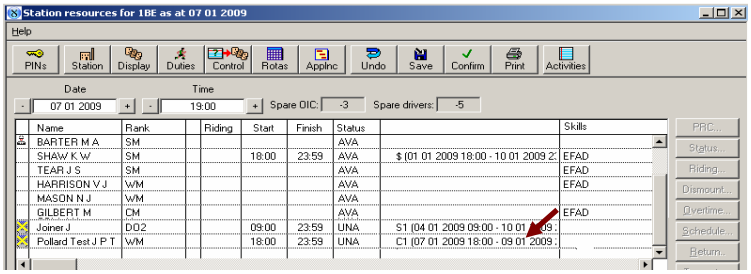
The system has also updated the Personnel Record Card (PRC) Sickness and Absence windows and the Availability window – as shown…



As you can see in the '**Station Resources'** the person who is off sick is now unavailable for duty

The system also lets you know the date he/she is due back to work.

If the person has called in and is now off for additional 3 days

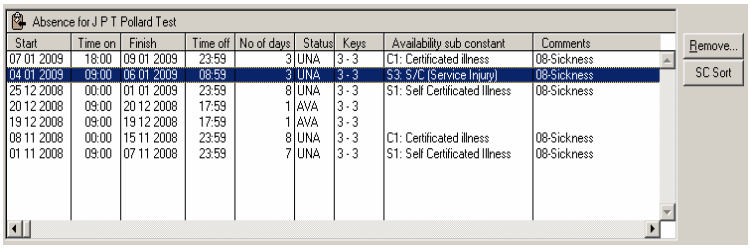


As you can see the system has updated itself to the last day he/she is off sick.

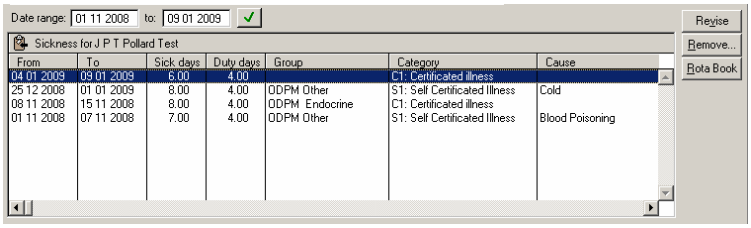
You may notice that the day and time is different in this example compared to the last – this is because the person is on a night shift and will not show up in a day shift time pattern.

In the Personnel Record Card

The Sickness that has been entered is showing in the Absence sub menu


Absence for J P T Pollard Test
Start
Time on
Finish
Time off
No of days
Status
Keys
Availability sub constant
Comments
07 01 2009 18:00 09 01 2009 23:59 3 UNA 3 - 3 C1: Certificated illness 08-Sickness
04 01 2009 09:00 06 01 2009 08:59 3 UNA 3 - 3 S3: S/C (Service Injury) 08-Sickness
25 12 2008 00:00 01 01 2009 23:59 8 UNA 3 - 3 S1: Self Certificated Illness 08-Sickness
20 12 2008 09:00 20 12 2008 17:59 1 AVA 3 - 3
19 12 2008 09:00 19 12 2008 17:59 1 AVA 3 - 3
08 11 2008 00:00 15 11 2008 23:59 8 UNA 3 - 3 C1: Certificated illness 08-Sickness
01 11 2008 09:00 07 11 2008 23:59 7 UNA 3 - 3 S1: Self Certificated Illness 08-Sickness
Remove...
SC Sort

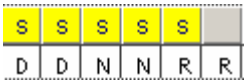
There are two entries for the same sickness. This is because the first 3 days is under S/C (Service Injury) and the other 3 days are under Certificated Illness. This is also a good way to see – Depending on your Sickness setup – if the first 7 days is Self-Certificated and the 8th day onwards is Certificated or if the Sickness conditions have changed.


Date range: 01 11 2008 to: 09 01 2009
Sickness for J P T Pollard Test
From
To
Sick days
Duty days
Group
Category
Cause
04 01 2009 09 01 2009 6.00 4.00 C1: Certificated illness
25 12 2008 01 01 2009 8.00 4.00 ODPM Other S1: Self Certificated Illness Cold
08 11 2008 15 11 2008 8.00 4.00 ODPM Endocrine C1: Certificated illness
01 11 2008 07 11 2008 7.00 4.00 ODPM Other S1: Self Certificated Illness Blood Poisoning
Revise
Remove...
Rota Book

And the Sickness sub menu the whole 6 days are shown as one sickness under the last entry 'Remarks' entered.

Remove a Sickness from the Duty Rota Book

If you accidentally entered the sickness to the wrong person

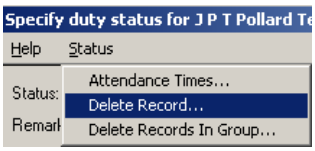


- Click onto the grey box of the sickness you want to remove

The Specify Duty Status window will appear

To Remove 'A' record

In the Top left hand corner



- Click onto Status
- Click onto Delete Records

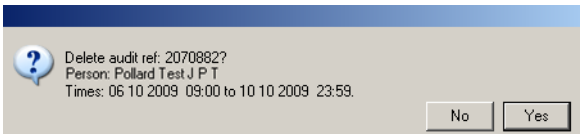
A dialog box appears asking you if you want to Delete a Records

To Remove a 'Group' of records

- Click onto Status
- Click onto Delete Records in Group

A dialog box appears asking you if you want to 'Delete' **All** Records in the group

Dialog box appears asking if this the correct Record



- Click onto the Yes button
- Click onto the OK button

The 'Status' and 'Remarks' field will default back to {None Selected}

The Sickness will now be removed from the Duty Rota Book

If a $ sign appears – Repeat the Process

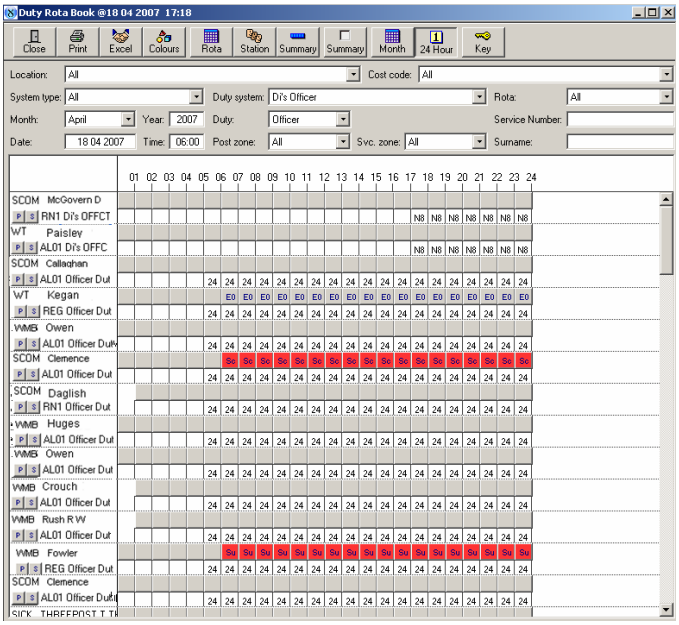
More defined detail on how to remove a record from the Duty Rota Book go to page 161

24 Hour Icon

The 24 hour option lets you view the Duty Rota Book on an hourly basis instead of a daily basis.

- Choose your Search
- Click onto the 24 Hour icon

- Click onto the Rota icon



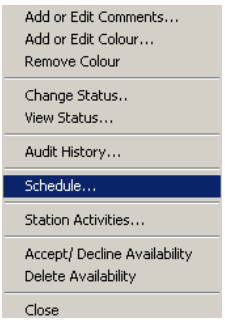
As you can see the schedule within a 24 hour day is now displayed.

This gives you a quick outlook on whose available and if not available why.

Sick, Outduty, Training, Leave etc

If you would like to put someone on training for a few hours, or they have a meeting, anything that will make them unavailable you can easily do this from the Duty Rota Book by

- Hold down the Ctrl key
- Click onto the hours you are saying that person is unavailable

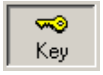


You can either

- Right Click and choose the Schedule button

or

- Click onto the Key Icon



Let's Start by clicking onto the Key icon

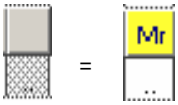
Key Icon

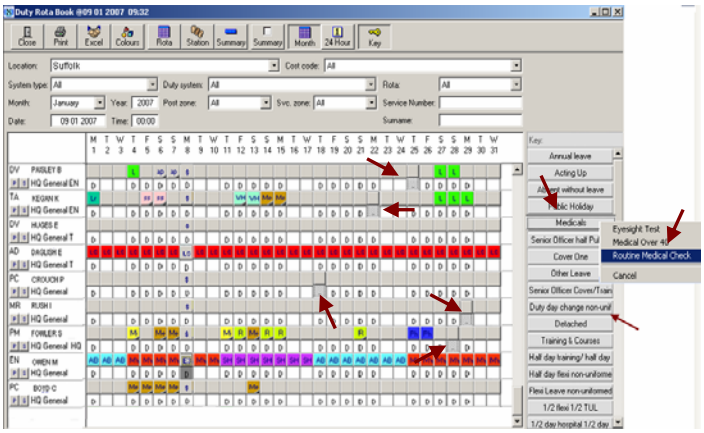
This is a short cut way to assign appointments/leave/training etc

- Click onto the 'key' icon

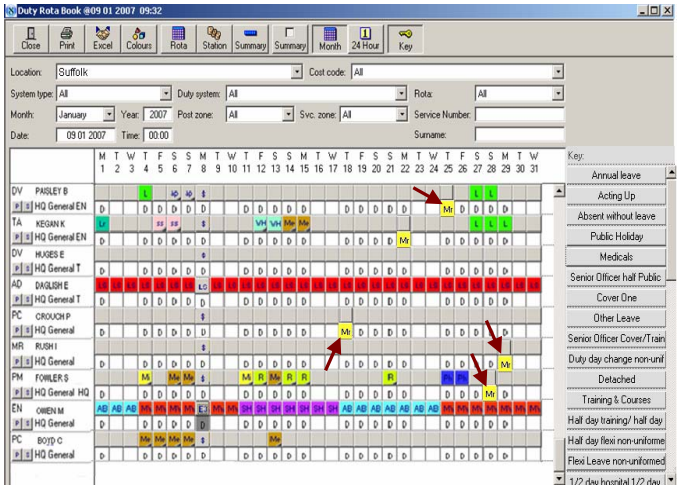
Say you wanted to assign five different people to an eye appointment on five different days…

- Hold down the Shift key on the keyboard
- Click onto the selected squares
- Go to Medical
- Select Routine Medical Check





As you can see the Routine Medical Check has been entered in the dedicated squared

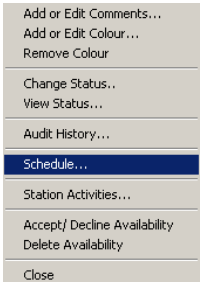


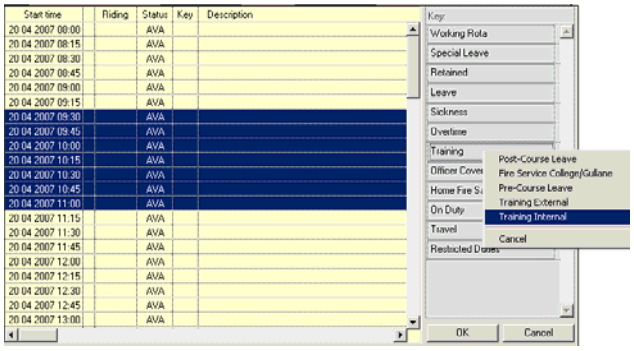
- If you want to give someone five days leave
- Hold the shift key down on the keyboard
- Click on the first and last day of the leave
- Click onto the leave key
- Select the type of leave

Schedule

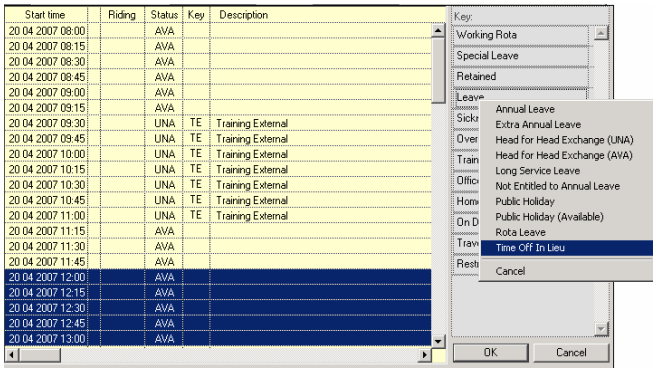
This will give you an hourly account of a persons Schedule. If someone has external training in the morning and an appointment in the afternoon, this can all be entered onto the daily schedule – as shown below -

- Right hand mouse click the required rota square
- Click onto the 'Schedule' option

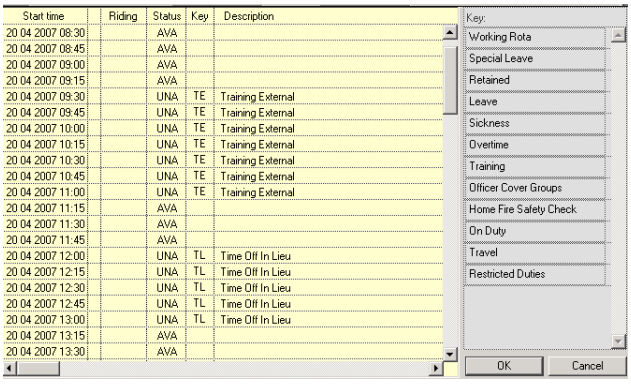




- Highlight the rows
- Enter what is scheduled - as shown –



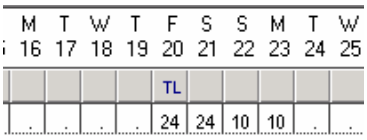
- Highlight another group of rows
- Choose an reason why they are unavailable



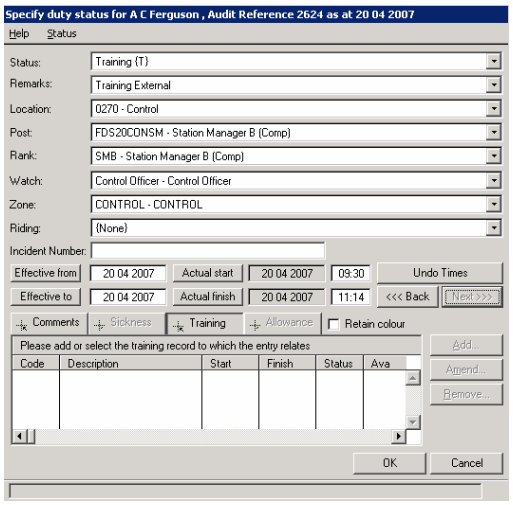
Once completed

- Click onto the OK button

This will take you back to the Duty Rota book



- A number(s) or letter(s) will appear in the square
- Click onto the square


Specify duty status for A C Ferguson , Audit Reference 2624 as at 20 04 2007
Help Status
Status: Training (T)
Remarks: Training External
Location: 0270 - Control
Post: FDS20CONSM - Station Manager B (Comp)
Rank: SMB - Station Manager B (Comp)
Watch: Control Officer - Control Officer
Zone: CONTROL - CONTROL
Riding: (None)
Incident Number:
Effective from 20 04 2007 Actual start 20 04 2007 09:30 Undo Times
Effective to 20 04 2007 Actual finish 20 04 2007 11:14 <<< Back Next >>>
Comments Sickness Training Allowance Retain colour
Please add or select the training record to which the entry relates
Code Description Start Finish Status Ava
Add... Amend... Remove...
OK Cancel

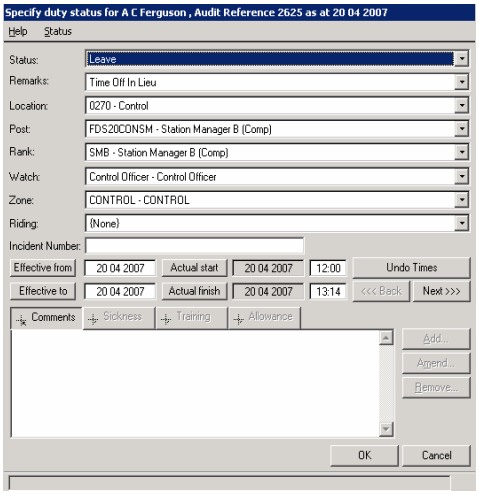
This will open the 'Specific Duty System' window

As you can see the training information has been set

Any amendments, like Location, times etc can be added/changed here

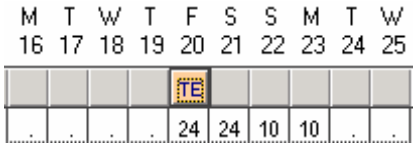
If there is more than one 'Status been 'Scheduled' the 'Next' and 'Back' buttons will go from gray to black.

- Click onto one of the buttons to scroll through the persons appointment schedule.


Specify duty status for A C Ferguson , Audit Reference 2625 as at 20 04 2007
Help Status
Status: Leave
Remarks: Time Off In Lieu
Location: 0270 - Control
Post: FDS20CONSM - Station Manager B (Comp)
Rank: SMB - Station Manager B (Comp)
Watch: Control Officer - Control Officer
Zone: CONTROL - CONTROL
Riding: (None)
Incident Number:
Effective from 20 04 2007 Actual start 20 04 2007 12:00 Undo Times
Effective to 20 04 2007 Actual finish 20 04 2007 13:14 <<< Back Next >>>
Comments Sickness Training Allowance
Add... Amend... Remove...
OK Cancel

As you can see it will also change in the 'Specific Duty Status' window.

Back in the Duty Rota Book – depending on the time – the Availability key will change from; in this case, the 'TL' for training to 'TE' Time of in Lieu.

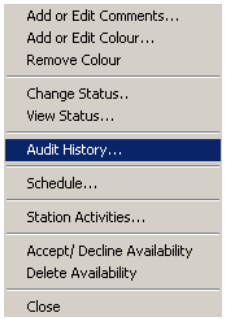


- Click onto the OK button to close the 'Specific Duty Status' window.

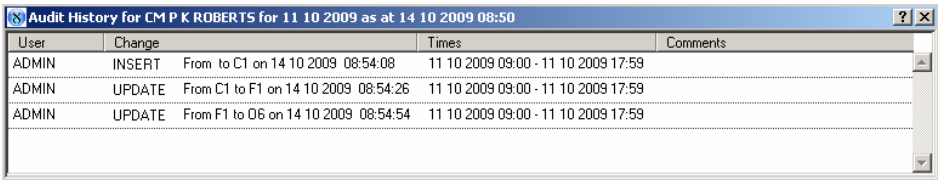
Audit History

Audit History is a good way to keep track of entries and changes that have been entered in the Duty Rota Book

- Right click onto the grey box
- Click onto Audit History



The Audit History window will open - As you can see in this example



There have been three changes that have been entered and who made the changes and the date and time the changes were made.

To close this window

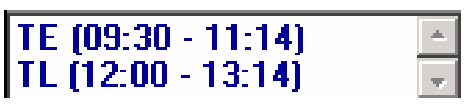
- Click onto the 'X' icon

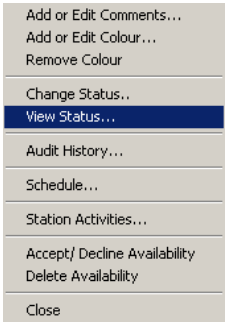
View Status

Another good way is to see straight away any appointments for that day – if more then two use the arrows to scroll up/down.

- Right click onto the box
- Click onto View Status

A box will pop up showing that days appointment and times





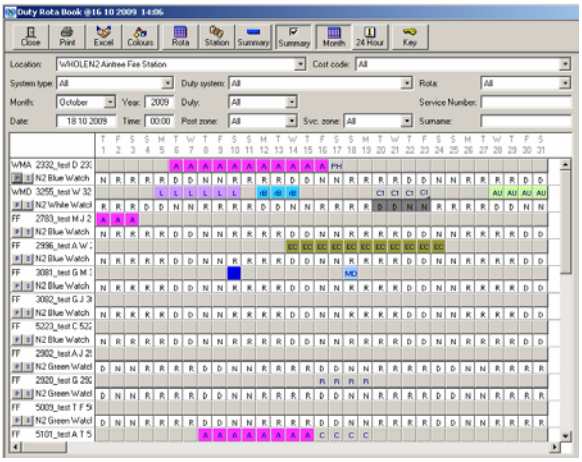
How to Change/Remove Specify Duty Status

There are two ways to Change Allocated Leave / Sickness / Meetings, anything that where entered into the Duty Rota Book, you can change individual days or change a group of days.

Changing Individual Days

Open the Duty Rota Book

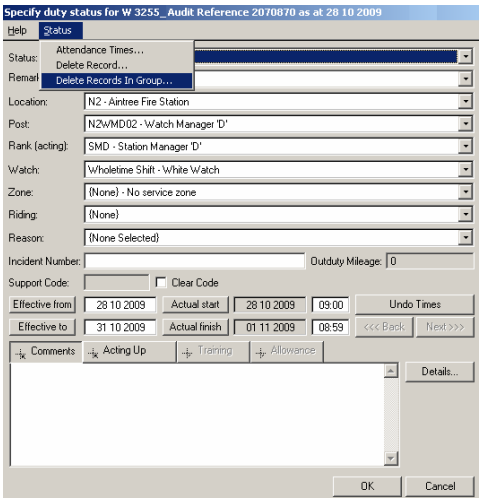
- Click onto Rota & Availability
- Click onto Duty Rota Book



The Duty Rota Book will open

- Choose a Location
- Click onto the box you want to change / remove

The 'Specific Duty Status' window will appear



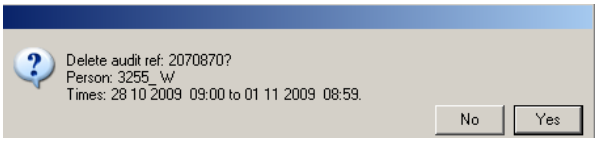
In the Menu bar

- Click onto the 'Status' option

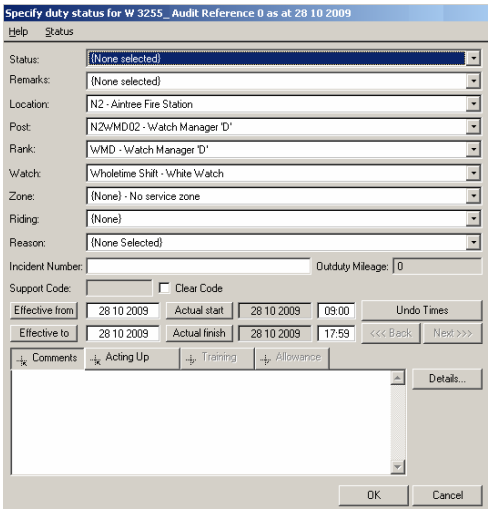
- Click onto 'Return to Original Status'

A dialog box asking if you are sure, will appear

- Click onto the YES button
- Click onto the OK button on the 'Specific Duty Status' window



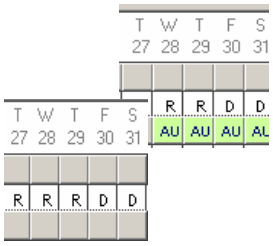
Within the Specify Duty window

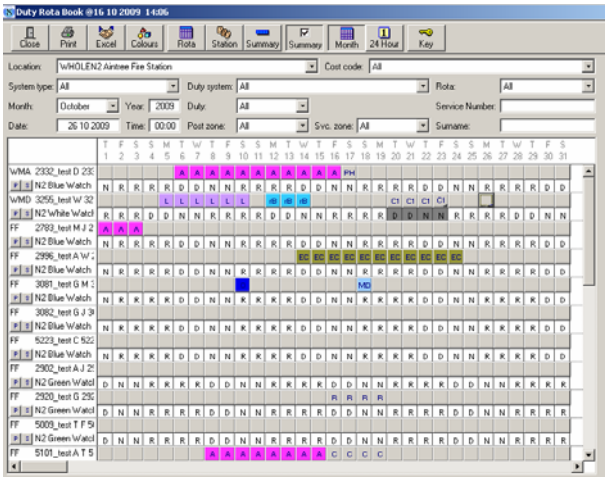


The 'Status' and 'Remarks' fields will default back to {None Selected}

- Click onto the OK button

As you can see, the box that was green with 'AU' on the box (for Acting Up) has now returned back to a grey box, meaning this person is now available for duty.

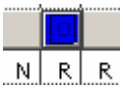




Delete A Record

To Remove 'A' record

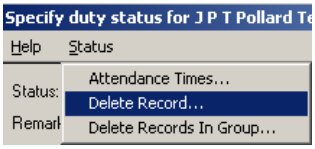
- Click on to the record you want to remove

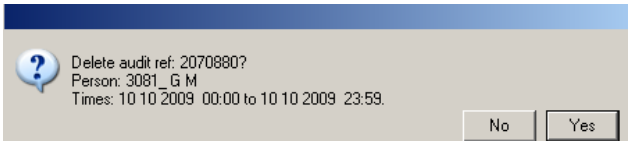


This will open the Specify duty Status window

In the Top left hand corner

- Click onto Status
- Click onto Delete Records





A dialog box appears asking you if you want to Delete a Records

- Click onto the Yes button

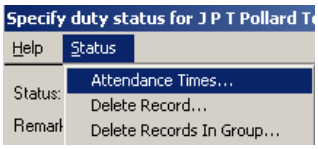
The 'Status' and 'Remarks' fields will default back to {None Selected}

- Click onto the OK button

As you can see, the box that was blue with 'O' on the box (for Overtime) has now returned back to a grey box, meaning this person is now available for duty.

Attendance Times

- Click onto Status
- Click onto Attendance Times



A dialog box appears showing you the actual time you worked and the Shift time you was scheduled for that day – this is good to check and see if a person is doing overtime.